

Complete and Submit the SF-429 Transcript

>> ANNA-LISA WALTERS: Welcome to the Complete and Submit the SF-429 in the GrantSolutions Online Data Collection System training. Let's begin by going over the agenda for this session. We will start with an introduction to the Online Data Collection System and the SF-429, then we will talk about how to log into the system. Once we're logged in, we will move on to using the enhanced home page and navigation, and then we will go to completing and submitting the SF-429-A periodic annual report. This will include how to access the form. How to edit, validate, and add attachments. Then we will talk about how to certify or electronically sign the form, how to submit and, if necessary, unsubmit, and then we will discuss revisions. Once we have finished talking about the SF-429-A, we will move on to the SF-429B acquisitions request where we will also talk about how to create and complete the form. Next, we will talk about the SF-429C disposition request where we will also talk about how to create and complete the form. Next, we will look at how it tracks the report form status, and lastly, we will go over help/support and resources.

Let's begin. Introduction. The Online Data Collection System is a convenient web-based tool used to submit forms. Because it is web-based, all you need is an internet connection, your computer, and a browser. And of course, your username and password. Grantees will enter, validate, certify, submit, and retrieve information pertinent to the SF-429 forms in the Online Data Collection System. The grantors process is that they will electronically review those forms. They will approve or return the forms for correction. Let's talk about permissions. The Online Data Collection System is role-based which means that users can only perform actions if they have the necessary permissions. As a grantee, you may be assigned one of the following job types, which are a predefined group of roles. You can be assigned the grant administrator job type, which has all possible grantee roles associated with it. There is also the grant director and authorized official. These job types allow someone to view forms and to print, but also to certify or electronically submit. By default, the grant director and authorized official do not have any data entry or submission permissions. The next job type is data entry person. By default, this person can create a new form. They can add file attachments. They can delete forms, edit existing forms, and they can view and print forms. They do not have to submit or unsubmit roles, but they can request to have those. And the last job type that is available for grantees is the view only user.

This allows you to view and print forms but you can't certify or submit electronically. Now that you know which job types are available as a grantee, the next step if you don't already have access to the system is to request access to the SF-429. To request access, you will want to create and submit the grantee user account request form to access the SF-429 forms, and once complete, you can submit this to your grant specialist. To get a copy of the form, you could also contact your grant specialist and they should be able to provide that to you.

All right, now we're going to talk about your workflow for submitting your SF-429. Your process will be to create and save the form you're working with, whether it's the SF-429 A, B, or C. You're going to enter the data and then save. The save retains the information. You don't have to do the entire form at one time. You can do it whenever you are able and as long as you save, you can come back later to continue working on it. The next step after save is to validate. So, this is an actual step in the system where you would click the validate button and this checks against the rules to make sure that you have filled in all the appropriate information, all attachments that need to be added to the form are there, and to make sure all your calculations are correct. The validation is a really important step. If you are missing anything, you are either going to get an error or a warning, and we'll talk about that a little later when we work with the form itself.

The next step after you validate the form and you have no errors is to certify. And that is the electronic signature. Now only somebody with a certify role, which by default, would be the grant administrator, the authorized official, or the grant director, only they can electronically sign the form. This is their electronic signature acknowledging that everything is correct. Once their form is certified, then the last step is to submit. And this officially sends your form to your grantor. Now, just a note, when a form is submitted, email notification is automatically sent to designated grantee and grantor staff. If you submit a form and you don't get an email notification, it's possible that you don't have that turned on for your account and you can contact your grant specialist to see if they can have that turned on for you.

Now, let's talk about the SF-429. So, there are three possible forms that you would submit in OLDC for the SF-429. The first possibility is the Attachment A, which is general reporting. The SF-429 A is an annual report that is submitted once during the budget period at the time the final SF-425 is submitted. The next two forms are actually requests. The SF-429 attachment B is the request to acquire, improve, or furnish. This form is created on an as-needed basis. You can submit the

request as soon as the grant is available in GrantSolutions, even after the grant is closed. And the SF-429 attachment C, which is the disposition or encumbrance request, this form is created on an assist-needed basis. The grantee can submit a request even after the grant is closed.

All right. So, let's move in and talk about log-in. So, assuming that you already have your user name and password, you've received that by email, and if you already have a GrantSolutions account, then this is the same username and password that you use to access GrantSolutions. So, what you're going to do is you are going to, with your computer, go to a browser such as Internet Explorer, Mozilla Firefox, or Google Chrome, and you're going to go to the GrantSolutions website because you do log into OLDC from GrantSolutions. You will go to www.grantSolutions.gov and the GrantSolutions public website is going to appear. Towards the top public website, you have a button that says "Log into GrantSolutions." Click that button, and then the GrantSolutions log-in screen is going to appear. From the user field, you are going to enter your assigned GrantSolutions username and your password, and you will click the log-in button. Now, when you click log in, you are going to land on one or two screens. If you use GrantSolutions, the GrantSolutions grants management module, then you're going to see the My GrantSolutions screen appear. From that screen, you are going to have the Online Data Collections menu bar and you will go ahead and click that menu option. When you do that, the OLDC home page will appear in a similar menu. Now, if you don't use the Grants Management Module then you're going to land on what we call the GrantSolutions Portal Screen. Towards the top of that screen, you're going to see a menu that says OLDC. You would click the OLDC menu and the OLDC home page will also appear in a new window. This is what the OLDC home page looks like.

So now we're going to move on to the enhanced home page and navigation. At this point in the session, I am going to exit out of my presentation and instead I'm going to go to my browser. I'm using Chrome. And I'm going to show to you how you get to that public website. So, we have GrantSolutions.gov. I would go to log into GrantSolutions. And it brings me to our production log-in screen. Now, I'm not going to log in from the screen. I am going to use our demonstration system so bear with me for one moment while I switch over to a system that looks very much like our production, and I am going to log in. I'm entering my username and my password. Now, if this is the first time you've logged into GrantSolutions, you will need to change your password for security purposes. I have logged in before, so it's not going to ask me to do that. So, I'm going to go ahead and

click log in. Since I do use the GrantSolutions Grants Management Module, I'm going to land on this screen and go into the online data collection menu. So here I am on the OLDC home page.

And let's go over the navigation first. So, you'll notice towards the top of the screen I have my username and my last log-in. I also have a link that says "End OLDC." It's good practice to click that and close the window and disconnect from the server when you're done using it. You'll also see I have a list of links. This is your menu list. To access your form, you can always go to report form entry. That's one way of getting there. I'm also want to point out that you have an End OLDC link here, too, so if you wanted to close the system if you were done using it, you can click that link. And then we have some privacy and accessibility links. So, I'm not going to go over all of those. The two you really need to be concerned with are report form entry and OLDC. Toward the top of the screen, we also have a link that says OLDC home. Now, this is what I call a navigation link. As we go to other screens in our system, the navigation links grow and you can use these to go back and forth between your pages so if I go to report form entry, notice I have a new link that appears that's called form selection, and my OLDC home link is still there. So, if I want to return to the home, I click that link and it brings me right back. So, you do want to use your navigation link to go back and forth in this system. Using your back button is not a good idea because this is a web based system. For security purposes, when you use your back button, a lot of times your data could be lost so you do want to make sure you use your navigation links. Okay.

So, we've talked about the navigation on this home page and also our navigation links which we'll see as we go through the system but I also want to talk about something that's called our enhanced home page. Now, we have a link here towards the top right side of the screen that says Switch Home Page Enhanced. I'm going to do that. So, you'll see when I do that, I have kind of a tab structure towards the center of the screen. This is going to be kind of your dashboard of work, but you also have, here we go, our navigation links. So, these navigation links on the left-hand side of the screen are the same ones as before but we've moved them to the side so you can still access them at any time. I do want to talk about our tabular structure here. You have three tabs available. My Recent Activity. This is going to show you all the forms you have recently worked on so instead of having to navigate through report form entry, you can see the ones you're working on right here. So, in this case, my recent activity, I have been working on a particular form. This is the SF-429A and I can see the status, which is submission and review

by the regional office. That's the RO.

Now what I can do if I needed to is go ahead and view the report, read only. Because it is submitted, it will be read only. Or I can navigate to what's called the reports status page. It has a lot of good information and we'll see it a bit later. From the reports status page, if it's in the submitted stage, if you have the appropriate role, you can actually unsubmit it. You also have the ability to see who performed what action when. It's our history. And you can see all the attachments that were added to your form.

So, this is a really nice feature here. If you have a lot of different forms that you were working on, you also can export them to Excel and you can print this list. So this is your recent activity. I'm now going to go to our next tab, which is activity report. So, activity report allows you to search by program and by grantee. This is if you have something that's in progress. I don't have anything in progress right now. That's why I don't have anything to select but if you did, you would be able to be find it here.

The next tab is the report due tab. This is if you have any reports that are due and you need to work on. So, I don't have any reports for my organization that are due right now. But this, for you, would be applicable for the SF-429 A since it is an annual report. This would not be applicable for the SF-429 B or C since those are as-needed reports and they are not associated with a due date.

So I'm going to go ahead and I'm going to go to an SF-429 A, but at this time, I'm going to use the report form entry link. And it's going to allow me to search for the form that I need. So the first step from the form selection screen is to select the program that I want to work with. It is possible you may only have one program assigned to you, and that's fine. But if you have more, you would just select the program that you need. I'm going to go ahead and select start.

Under step 2, we're going to select the grantee name. Now, chances are, you are only going to be assigned to your own grantee organization, so I am the organization Space Adventures Limited. If you had two organizations you were associated with, for example, maybe you had 2 EINs, one expired but you still need to report on that, then you may see two different items in the dropdown also. But I only had one, so I'm going to leave that there. And then under step three, I need to select what form I want to work with. Now I'm going to go over each one of these briefly. You may notice that in my list, I do have an option that says No Property Attachment A. This will only appear if you are a head start grantee. Any other programs will not see this. If you are a Head Start grantee, you are required to

report on whether or not you have property every year even if you don't have improvement so if you don't have property and you just need to say that, then you would use the No Property Attachment A. However, for everyone else and if you do have property you need to report on annually, then you would select the SF-429 A. This one right here. The status report. But you also have the option here to select attachment B, which is a request, and attachment C, which is a request.

For now, we are going to begin with attachment A. Let me go ahead and select that. When I select attachment A, my screen refreshes. I have additional steps that I need to select. The first step is to select the grant that I'm reporting on. So let me go ahead. I only have one in my list so I'm going to select that. Under step five, I select the budget period or year of support, and I'm going to choose here, number 2. And then since I obviously have one option, that is going to be my period covered by this report. Now this one says that it is due -- this one is a little bit late but we're going to use it anyway for training purposes. So I click the radio button and next I'm going to go to step seven. So I've made all my selections.

In step seven, I now need to select my action and the actions you have available to you will really depend on what job type or role you have in this system. So let me explain what these are. So I have new edit revise. So if I have the data entry capabilities, I'm going to be able to initialize to start my report. I would also use new, edit, revise if I wanted to work on a form I had already started so I can edit it, continue working on it. Now, revised portion. We do have a feature in our system that if you have already submitted a form or report and it has gone through the entire process, you've submitted it. The federal staff have approved it. It's gone all the way through as far as it can, you can approve reports. If you need to make changes, you can create what's called a revision and that revision is an exact copy of the approved reports that the fields are open so can you make changes and our system keeps that original report and then creates a copy of it so that way you can go ahead and make your changes since each instance is going to be saved. So that's what new, edit, revise is.

We also have view/print status, approve report. View/print status will take you to the approved report status page where you can see status, history, all the approved attachments. So that's what that is for. You also have the ability to print your forms in your browser version, your HTML version. You can view the latest report, and we're just going to skip clone for now.

I'm going to go ahead and select for attachment A, we're going to go to new, edit, revise. Start our report and click enter. That brings us to the report sections screen. I want to

point out towards the top of the screen you're going to notice we have an information box and it's going to contain a lot of the information we selected from the core selections screen so if anything here is incorrect, maybe you chose the wrong budget period year of support or the wrong grant then you can use your navigation link and go back to form selection. I remember not going to do that because I'm happy here on my report sections screen and let's take a look at what features are available to us. So on this screen you're going to see I have some action buttons available.

These buttons are exactly the same. The reasons why they're at the top and bottom is because we do have some forms that are rather long and have lots of sections so that way people don't have to scroll up and down. For this one, you really only have two sections so it's not that big of a deal. But the first option you see is view/add attachments so if you wanted to add a document to the form itself, not to a specific place in the form but just to the form, you can use view/add attachments to add an attachment as long as you have data entry ability. Next we have validate. A button that you're going to see again if you have data entry capabilities but you only want to validate once you have saved your data and you want it check to make sure you're not missing anything and that you've met all of the rules and the criteria. And then the last button we have is "Print full report." This is if you wanted to print as a PDF all your different sections and this button does not include attachments. There is on the report form status page a place where you can submit once your report is submitted with attachments but we'll get there towards the end. Okay.

So we've looked at the action button. Now let's look at the sections themselves. So for the SF-429 A you always need to complete your cover page and your attachment A general reporting. So each these sections can be edited independently. So if you had two people in your organization with data entry capabilities, one person could be working on the cover page while the other person was working on the attachment A section. However, you cannot have two people working in the same section at once. If you try to do that, the person who is second, when they try to edit, they'll get a pop up message saying, hey, this other person is in it. Do you want to open a read-only version? So you can only have one person in a section editing at one time. Now, let's look at the drop down list.

So for cover page, you have the option to clear section data. That's if you already started typing in information and realize this was the wrong information, you can then clear it and it will wipe it out. Now if I do select "Clear data," you have to click go before it will remove everything and you'll get

a message saying, hey, do you actually want to do this? I'm not going to actually clear data. We haven't entered anything yet, so let's look at some options we have under the drop down list. The second one is to clear sections so when you're ready to begin working on the cover page, you select edit section and click go. And then the last thing we have for the cover page is just to print section. It's not going to print the entire form. Just the cover page so if you wanted to do that, you can certainly select print section and click go.

Now, I'm not going to do any of this for the cover page yet. Instead, I do want to go to attachment A and you'll notice that we have a lot of the same actions but there is one additional action that the cover page did not have and that is the "Create section" option in that drops down list. So, if you want to create another section, you have the ability to create as many attachment A sections for this report as you need. Just keep in mind that data entered in the original section is not copied in the section so you will be able to enter your information in each section. Now, you'll notice here under attachment A that this says zero. That's because this is the very first of the attachment A sections, and again, if you create a new one -- actually, no. Let me do that so you can see it. So I create a new session. Okay. It's going to create a new one here. There we go. You notice how it just says zero. So this zero is going to update when you complete 14A real property and save it. 14A real property name, that's going to be the name that appears here. All right? So it won't say zero forever. You will give it the name, save it, and it will update. I only do want one attachment A selection so for the one I just created, I click on my select action drop down. I have delete section. I only deleted it because I created. I can't delete the original.

So there we go. We see name, drop down list, and also section status. So our status right now is initialized and that means we have opened the form but we haven't actually saved anything. So let's begin by editing the form and I'm going to start with the cover page so I'm going to go to my select actions drop down list, click edit section, and select go. And that's going to bring me to my report screen. Okay? So this is where we are. Report. Now, you'll notice report sections is a drop down list. If I want to go back to the sections screen, I can just click to report sections. I'm on the cover page right now so that's not really going to take me anywhere but if I wanted to go to attachment A, that section, I could click right here and it would take me there. I'm going to stay on the cover page right now but I also just want to point out we do have what we referred to as a phantom link here asp report and that says

report form status. So this will take you to report form status. We see the status of your report, the history, and any attachments. So we'll look at report form status later.

But here we are on the report screen and you'll see towards the top that we do have our information box just like we saw on the report sections page and we'll see the report status and the sections statistics us. So the section status is initialized. Again, we haven't saved any data in the section. As I scroll down, I do want to point out our report progress bar.

The report progress bar is a tool that you can use as a visual indicator of where you are in the process, and what steps still have to be taken. So, for our grant recipients who are reporting, initialized and edit saved is already checked. You still will have to validate once you complete your form, have it electronically signed and then submit it. Once it's submitted then it goes to the grantor. So the progress bar in this case for the SF-429 A says that the grantor will bring it under review, which will lock it down. That means you won't be able to unsubmit once it's in review. And then if they approve it, then it will go to regionally approved. RO approved. Now, the other form. The 429 B and the 429 C have an additional step for the grantor where it will also say CO approved, but this is the one for the 429 A.

So let's scroll down and take a look at the form itself. You'll notice that a lot of the information is prepopulated. That comes from GrantSolutions. You'll notice that help text appears. You're going to be able to see instructions of what you can put under here. It's telling us pretty much that you can enter the grant or instrument numbers or other identifying numbers to the federal financial assistance award. I'm not going to read all of the help terrific, but I do want to point out that any time you have that blue underlined text, you can just click it for instructions.

Now, I'm going to go ahead for this particular form, my report, the 429A, I am not going to identify any other numbers so because I don't have anything else to enter here, I'm going to type in NA. Now, I am required to enter a contact person for this report so I'm going to go ahead and submit -- make sure I enter the phone number. There we go. Got my phone number here. I'm going to enter email. Then if you have a fax number there, you could also enter that so I'm just going to use the same number here. All right.

Now, as I scroll down you'll see that under realtime property report, A is selected by default but if you needed to add a comment, you could enter text here and also add additional sheets as necessary to this comments box. So if you want to add some information that really doesn't go anywhere else in your

report, you can do so here. I'm going to do that. I'm going to just say, please see attachment. And you'll notice at the end of nine where it says comments, there's a little paper clip icon. This is what we call a cell level attachment. So if I want to add an attachment specifically to number 9, comments, on the cover page, I click that paper clip icon and it will tell me this is a cell level attachment. I'm going to choose the file I want. I'm going to choose my comment file from my network, and then I click Attach File. I get a message letting me know that once this file is successfully uploaded, it's going to change to the saved status. So right now when I say successfully uploaded, what's happening is the online system is scanning for any viruses and then the background is converting it to a PDF so that when the file is submitted, you'll have the ability to create a PDF that includes not only the form sessions but also attachments. All right? So I'm going to click okay and you'll see here all the information. You'll see the cell location, the file name, the date it was uploaded, the person who uploaded it, are and right now, the upload status.

Now, just a tip, when the upload file is still pending, still doing that virus scan, PDF conversion, you will not be able to certify the form. It has to be in the saved status before you can do that. Takes about a minute or so and then it will be done. Now you'll notice also in the actions column that I do have a red X. If you accidentally upload the wrong file, you can click the red X. You don't have to wait until this is done uploading. You can close it and continue to work and it will be doing its thing. Notice that paper clip icon has a little green note attached to it. That's just to indicate that there's an attachment associated with this cell. What I'm going to do at the bottom of the screen is click save. It's really good practice to save frequently because this is a web-based system. If something happens, if you lose your connection, you don't want to lose your work so I highly recommend that you save frequently.

So now I'm going to go to my next section. Okay, so to go to my next section I can either use my report sections drop down or I also have a next sections button. So if I click that, it's just going to tell me, if you haven't saved, you'll use lose your data. But I did save so I can click okay" and it will take me to my attachment A. Here we are. So let's start talking about what we see here with attachment A. So with this particular section, you also are going to have some prepopulated information. Many of these fields are required. You want to make sure that you fill out as much information as possible. If you miss something, don't worry. When you validate, it will tell you when you miss something.

So, let's start towards the top here. We have number 13. Period of federal interest. you do need to select the From date. So if you click on the drop down, I'm just going to pick a date here. If you're not sure, by default, there is an uncertain text that's entered. You can leave that there, but if you do know when the federal interest period ends, then you can click a date.

Now, also under type of federal interest, you do need to select one of these check boxes. I'm going to go ahead and select acquisition but I do want to point out that ACF, the grants for the administration of children and families, are not allowed to select government furnished property. If you are an ACF grantee and you select this, you will get an error message. So I'm going to go ahead and select acquisition. Under the description of the real property, I'm just going to type in the Rockville space. Children's center. And I'm going to use the same test for the real property name.

Now, of course, you would want to make sure that you type in all the information that's accurate for your property. I'm just doing this for our training purposes. So, we have our real property. This is the name that when I save will appear in the sections screen. I'm going to go ahead before I go any further, I'm going to save here. And I'm going to return to the reports sections page. And now see here, we no longer have the zero. It says property name. The Rockville Space Children's Center. So you can see how that updates. I'm going to go back to section A and continue editing, and let's fill out the rest of this. So under legal description, I am going to put this information again and I will just say this is in Rockville, Maryland. Now, under legal description, you also need to make sure you add an attachment. This is a requirement. So I'm going to go ahead and click my paper clip icon for legal description. I'm going to choose my file that I need. There we go. And now I'm going to attach it. Now, notice that the first file that we attach is now in the uploaded status of saved. So we know that that one uploaded successfully. I'm going to go ahead and close this and continue working.

Under 14B, also, we need to enter the address. Now, I'm going to go ahead, I'm going to type this in. Now, we have a really nice feature here, so I'm going to type in the street address, the city, and I'm also going to select the state. And the zip code. There we go. Now, we also have all this other information. County, Parish, GPS location and so on. I don't necessarily need to enter all that. I do have this validated address which has to be used. I'm going to go ahead and click validate address, and our system does work with the U.S. postal service and it's going to find the address and populate all this

other information, including the latitude and the longitude. I'm going to click okay, and it automatically updates the information. You can see that it's verified, so you do need to make sure you validate your address. I'm going to scroll down to 14C and we are going to enter the land acreage or square units amount. I'm going to go ahead and say 3-acres. Under 14B, it grows in usable square footage meters. I'm going to enter the growth. Let's do 2,000 feet. 3,000 physical. Not 30. There we go. Okay. So now, under real property ownership types, we are going to select our choice. Now, if we select, let's say, co-owned, for example, you can only select one of A, B, C, D, E, F, G, H, I, and you can also select G simple, if that goes along with it.

But the others are mutually exclusive, meaning you can only select one of the others. If we were to select other -- I'll going to select J. If we select J, then you are required to enter a description of what the other is. Pho, for our purposes, I'm going to go ahead and just say owned. And now we come to the real property cost. So this is the cost of your real property. Again, if there's any confusion of what you need to enter here, just click on our little help desk and it will tell you everything you need to know. So I'm going to go ahead and say the cost of the real property is 500,000. Now, when I enter the cost, I'm also required to attach financial information. Let me go ahead. Let me choose a file, and we're going to call it financial. And attach T. oh, give me one second. We seem to have a bit of a -- so this is just an example. If we are having a problem, then what you would want to do is go ahead and save your information. So bear with me for one moment.

All right, so let's go ahead and let's enter, let's add the real property cost attachment. So, here we go. Attachment. Okay. And now you also need to enter your federal share. 300,000. Notice I'm just entering the numbers and it will automatically add the dollar sign and the comma. Okay. Now the share percentage is going to update when I click save, so let me do that so you can see how that works. All right. So I've just clicked save. And there we go. You can see our share percentage has updated and our total sum. Now, let's look at 14G. We have had a deed, or lien covenant or other related documentation. If I select yes, then another section open where you need to review the documentation. If I select no, then you're good to. There's nothing more that needs to happen. And of course, if I select NA, then there's nothing more there. I'm sorry. I apologize. With 14G, if I select no, then you do need to enter your additional comments and add an attachment, if necessary. But I'm going to leave that as NA for now. I'm going to say no. I'm going to say no. For the environmental compliance, I'm going to

say yes just for an example. So I do need an attachment. So let me go ahead and find my environmental. There we go.

See, my files are growing. And I'm going to enter my description here. So you would enter your description. You'll notice that in some of your browsers, you have little lines toward the bottom of your box. You can use these lines to make your box bigger if you have a lot of text you need to enter. For now, I'm just going to enter, please see attachment. There we go. And then, of course, I need to enter the rest of my information. So I'm going to say no. 14K does not apply to me. No for most of these. Under real property dispositions status, I would select if there is anything here that I need to select. I'm going to say NA for now. If I had selected some of the others, then I would need to enter this information below. Towards the bottom of the screen, number 17, I do need to indicate the cumulative energy and consumption for the previous 12 months. I'm going to go ahead and just say 200 here. Petroleum, I'm say 200 again. Please excuse me if the numbers are not real, but that's okay. And then at the bottom, if you have any remarks, you would want to add them here.

So I would say, please see remarks in attachment. And again, if you need that attachment, you can go ahead and do that. I'm going to go ahead and enter my remarks. There we go. All right. So that's my last one. And when I'm done, I'm going to click save. All right. So now I think I have filled out everything I need to for the SF-429 A. What I'm going to do is click validate and let's see if I get any errors or warnings. Okay. So I have missed something. You'll see here in my error, it says 14B, unit required. If I click long description, it's going to give me an explanation. It says select only one unit, either square feet or square meters. So I have made an error here. If I go to the error for 14D, it's going to take me right down here. So here's 14D. Notice under select units, I didn't select what I needed. So I'm going to go ahead and click my radio button that I'm going to use.

When I revalidate, my error message should disappear. But I still have a warning. This warning is okay. If you have an error, you cannot go forward in the process but a warning allows you to move forward. This warning just lets me know that for number 13, enter end date if known. Otherwise leave blank. So I don't have a blank so I'm going to leave it as uncertain. That's okay. That kind of warning is fine.

So I'm going to go ahead and look at my attachments so view zootomic sure all of my attachments have uploaded, and they have. So the next step once I have entered all of my information, saved it, validated it. You can see that it's been validated. So the next step is to electronically sign or to

certify. So if I am an individual with the certify capability, by default, that's your grants administrator, all of them have certify by default. Then you can go ahead and certify this.

So I'm going to go back to my reports screen. I do have the certify button because I have the certify role. I'm going to go ahead and click the certify button. Now, if your organization, it may be somebody else who has to log in, come to the screen and electronically sign. So I'm going to go ahead and click certify and it's just giving me my little warning message, and that's okay. Now it brings me to the cover page. All right? So I mean back on the SF-429 A cover page. If I scroll down to the bottom of the section, button under 11B that says, click to sign. I'm going to click there. It's just telling me I'm going to electronically sign this. That's fine. Click okay. Now, down at the bottom, I have e-sign and my information is automatically entered here. Okay?

So, now that we have electronically signed, the last step for me as a grantee is to electronically submit my form to my federal grantor. So, again, you have to have this submitted role in order to send it to your federal staff. So, by default, only the grant administrator has this role but state entry person or anyone else can request to get that role. So to submit it, what I'm going to do is go to my report form status page to that phantom link here and from the report form status page, I have the submit button. Now, if I went to the sections page, I also would have the submit button so you can do it from either place and that's fine, as long as you have the role. Now, before I

>> SANDY: Let's say that it's been electronically signed and then you find a problem. The person who has the certify role also will have uncertify. So, if you need to make a change before you submit it, you can uncertify and then it will open up your fields for editing. You still have to validate and recertify before you can submit but for now, I'm going to go ahead and click submit because I do want to send this to my grantor. And there we go. We have our message. We have received your report along with all reports we have received along with the attachments.

So, here we are back on the report forms status page. From this page, you can see the original report you worked on. So you can view it. It is read only right now, but you can still access it at any time to view it. Can you see that the status is submitted with warnings. Date that it was submitted. Right now, because I do have the unsubmit role, I have the ability to unsubmit it, uncertify it, changes made, revalidate, recertify and then submit. Once the status is under review, you can no longer unsubmit. And then under print, we do have a little drop down list here. If you want to print the form from your browser,

you also can print the form under PDF. In a few menus, we'll come back here. It usually takes about three to five minutes. You will be able to print the report with attachments. Okay? That's going to appear from the drop down list. It just hasn't had time to process yet so eventually from this list we will be able to see that, but let's take a look at the rest of the page first. You'll see the upload date, the upload status, and who uploaded it. You also can see the report history, so you can see who performed what action when, and you have a list of contacts. Okay?

So, I'm going to just go back to my form selection page here. We can see that this was submitted with warning. I'm going to go back to the view print status page and let's see if we have a little drop down. There we go. And it's finished processing under print.

We have gone ahead and submitted our report. Now as I mentioned, we'll go back to original. You we now have the grantor to log in and approve, and if they approve the report, then the process will be complete. Now, if they do approve the report and you need to make a change, that is where a revision comes into play. You can go into new, edit, revise and you can see an exact copy of your form. The only change will be that you can still have open the form. It needs to go through the same workflow. Save, validate, certify, and submit. So that will stay the same. The only difference is on the report forms status page you will see the original but there will also be another row that says view revision one or edit revision one, revision two. So we keep all the different rows, different forms apart so that way you can see each one independently.

All right. So that concludes the SF-429 A. Let's move on to the SF-429 B. I'm going to go to the forms selection page and I'm going to select under report name, status report attachment B. Now, this one is very different from attachment A. This is a request. An as-needed. Because of that, although you would still need to select your steps one through four, okay, the funding grant period is step four, now, under step five, you're going to select your options, which is new. You want to create a new request for attachment B. And then there's nothing else to select here. You would go ahead and select enter. When enter appears, then you're going to have to enter a description of this request. Okay. Description of this form.

So, I'm going to call this one request to acquire. And create report. And there we go. On the reports sections screen, you're going to have information from the forms selection screen. Now we have attachment B. We don't have a budget period year of support yet. That is because that does not populate until you actually submit, and it associates this form with the

existing current budget period that you're standing in. So we have our description of the report, which is our request to acquire. And then down below, this is very similar to what we saw with attachment A, you have the cover page. The cover page is the same cover page that we have for attachment A. And then we also have attachment B here. Okay, request to acquire, improve, or furnish. Just like attachment A, you have the ability to create additional attachment B sections if you need to. So, everything else remains the same.

A difference is that with attachment B, it's when you enter 13A, the real property name, that this will update after it's saved. All right? So let's go ahead and let's look at 13B. I'm sorry, attachment B. And here we go. This is our reports screen. You'll notice that we have the information box towards the top and our report progress bar. Now the progress bar is similar, but there is one difference. Notice for the grantor, not only do you have RO approved but also CO approved and that stands for central office. So there are two levels of approval here. Your process still app ends at attach/submit. Now, for process B, we're going to use the same property name which is going to be -- here we are. The Rockville Children's Space Center. I'm going to enter that here under the real property name, also. Then we'll enter that for description. And I'm going to save but just like attachment A with attachment B, you do need as attachment to the legal description. Let me go ahead and enter that or add that. There we go. You still need to also enter our address for our property. Because I'm use Chrome, it actually saved my request and prepopulated it for me so I'm going to go ahead and validate. And there we go.

So, now, let's go ahead and scroll down a little bit more and let's look at the forms. So we have 14A. We need to describe the intended use of the real property. So, I'll just say teaching children, and if you need to add an attachment, you can certainly do so. There we go. All right. Again. 14B proposed real property ownership types. This is very similar to what we saw with attachment A. You can select most of these with C simple, if necessary. But the other ones are exclusive and if you select J you need to enter additional comments, but I'll go ahead and select owned. We have C, proposed acquisition date if necessary. So let's see. I'll go ahead and put this here. We have our 14D. The land acreage, so I'm going to do just what I did before.

Okay. We have our appraised vault this is our valuation. 500,000. We have our federal share. And not federal. And I also need to add my attachment for the valuation. There you go. Okay. And then of course we have the questions that we had before, so I'm going to go ahead and say no for a lot of these.

And if you did say yes, you would want to make sure that you added attachments or made comments if necessary. And 14J, this is a proposed action employ green/sustainable actions. Check all that apply. Check a couple here. And then of course what is the cumulative energy consumption. Attachment A. Okay. Do the same thing here. And then last but not least, any additional remarks. I'm going to say, please see attachment and we save it.

Now, I know I'm going to get an error, so let's see what happens. Let me click validate. Oh, no. Oh, Okay. So here's my error. And the reason I got an error is because when we click validate, it not only validates the section. It validates the entire form and we have not done the cover page. All right, but I do want to show you if I go back to the form selection page, notice that for this attachment B, I now have a row here and it tells me that I saved with errors. So if I want to go back and work with it, I would just go back and select my drop down here. I do have the ability to change the report description if I wanted to but I'm going to go ahead and say revise. So I'm going to say edit revise because I don't need a new one. And there we go. And I'm back, now, for the purposes of this training, I'm not actually going to go through the entire process of completing the cover page because it is the exact same thing we did with attachment A. You would just want to make you entered all fields that are required, that you attach if necessary, then make sure you save, validate, certify, and submit.

So, instead what I'm going to do now is go back to my form selection page and we're going to look at attachment C, which is another as-needed request. So, to start attachment C, again, you would choose your program name, grantee name, report name. You would have your funding grant period and just like we do with B, you would select new. And I'm going to go ahead and click enter and I'm gonna enter my description as disposition. And create report. And there we go. And here, we have our report sections page. Just like B, we don't have the budget -- I'm sorry, the budget carried the year support populated because that populates once it's submitted and it will be based on the year you're standing in. Okay? So that's why that's not completed right now. Just like A and B, with C, we have two different sections. We have the cover page, which is the exact same as A and B. And we also have our attachment C section, which you can create additional sections if necessary, just like A and B. So let's go ahead and look at the section. Here we go. We've got our report progress bar and it has the same steps for the grantee. You need to edit, save, validate, submit, and then it will go on to approve. They will approve if nothing needs to be changed. Then regional approval, and then central office approval. Let's go ahead and look at a form itself.

Just like report, we have description of report. Same one. And we'll enter that information like we did before. We'll add our attachment to the descriptions. So I'm sure by now a lot of this is looking very familiar. Description. Okay. Close there. We have our address. So I'm going to validate our address. Great. Verify here. And now we scroll down. So a lot of this looks the same. I'm in the going to fill out all of the rest of it because you've seen me do it several times already, but I do want to point out under 14A, this position of preference or encumbrance request, this selection impacts what question do answer next. So, for example, if D, Transfer Title is selected in 14A, then you also have to answer 14D here below.

If we were to select transfer of title to different ward, B, then you would need to fill out the proposed grant number and the transfer receiving entity information. I'm going to go ahead and select C for now. You use another federal lip sponsored project program and then if I select C, I do need to enter 14C. Okay? So I'm just going to say here, please see attached. And I'm going to add my attachment. There we go. Okay. And so, just like before, you would want to make sure that you filled out all of the information on the screen. We have our appraised value. You have lots of yes/no. If you select yes, so you can, just like the other forms, you would need to enter additional information or add attachments. So a lot of this is very similar to what we had before. And at the bottom of the screen, you have your remarks where you can add additional remarks, if necessary, and you can add attachments.

Now, what I'm going to do is I'm not going to fill out any more for attachment C because again, it's very similar to what we've just done with A and B. Instead, what I'm going to do is return us back to the home page, so I'm going to use my navigation home page. There we go. And from my recent activity, it's going to show me the forms that I have recently worked on, and once this is submitted, you can see here, when the grantor brings it under review, we can see right from my recent activity report status. We can track the status. So once it's under review, we'll see that there. If it's been returned, I'll see that also. I'll be able to say oh, okay, they sent it back to me. I need to make changes. And then if it's been approved, I'll be able to see here as well. So you can use this recent activity to be able to track your information.

Now, last but not least, I do want to go back to our PowerPoint presentation briefly. Here we go. And I want to talk a little about help/support information. So let me just turn that on and make it a bit bigger. There we government so our GrantSolutions partner support center is available to provide technical GrantSolutions assistance. So if you can't log in. If

you're getting messages that the system isn't working. If you're having a technical problem, contact our help desk Monday through Friday 8:00 AM to 6:00 PM eastern time. You can reach them at help@grantSolutions.gov or by phone. We have a toll-free number which is 866-577-0771. However, if you have a question pertaining to the form itself, what to fill-in, then you want to contact your grant specialist. Now, we do have information available to you, a guide, you can find on our documentation site. And our documentation site, if you use GrantSolutions, will be through the GrantSolutions help support documentation menu, and if you don't use GrantSolutions, you only use online data collection, then you'll also be able to find it from the help/FAQ menu within OLDC. All right. This concludes this session. I hope it was very informative. Thank you very much.

(Session was concluded at 9:09 AM CST)

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